



How to Complete the USDA School Food Authority Procurement Table



Health and Nutrition Services
Arizona Department of Education

Contents

Introduction	Page 3
Required Documents	Page 4
The SFA Procurement Table	Page 7
Submitting the SFA Procurement Table and Required Documentation	Page 17
Resources	Page 19



Introduction

WHAT IS A QUICK GUIDE?

Quick Guides are an abbreviated resource developed by the Arizona Department of Education (ADE) Health and Nutrition Services (HNS) Division. Quick guides are intended to compliment ADE's Step-by-Step Instruction: How-to Guides. They do not count towards Professional Standards training hours.

INTENDED AUDIENCE

This resource is intended for School Food Authorities (SFAs) to provide assistance in completing the SFA Procurement Table created by the United States Department of Agriculture (USDA) Food and Nutrition Administration (FNA).

PURPOSE OF THIS QUICK GUIDE

The SFA Procurement Table provides the Procurement Reviewer with key information needed to prepare for and conduct the procurement review, including primary procurement contacts, the SFA's procurement thresholds, and the types of procurements conducted and vendors utilized during the previous school year. This Quick Guide is designed to assist SFAs in gathering the necessary documentation and completing the SFA Procurement Table to support the procurement review process.



Required Documents

The Procurement Reviewer will provide the SFA with the SFA Procurement Table. This Excel tool must be completed and provided to the Reviewer. In addition to the SFA Procurement Table, the SFA must provide all other supporting documentation.

The procurement of goods and services is a significant responsibility of an SFA. Obtaining the most economical purchase price for the products or services needed must be considered when using Federal funds. Federal, state, and local laws and regulations specify the procurement methods, terms, and conditions SFAs must follow to competitively procure goods and services, award contracts, and oversee contractor performance per 2 CFR, Section 200.318(b).

Required Documents

THE SFA PROCUREMENT TABLE

This is a tool used to collect information about the SFA and the procurement method(s) used in each procurement transaction relating to the SFA's food service program that was paid for using the nonprofit school food service account during the prior school year. The table is not intended to capture other types of funding sources; only list purchases and transactions that were procured using the nonprofit school food service account. The following section will detail how to fill out the SFA Procurement Table.

SFA Procurement Table			
SFA NAME:			
SFA Instructions: List name(s), position(s)/title(s) and contact information of those person(s) authorized by the LEA/SFA as procurement agent(s) and who is/are responsible for compliance with local, state and federal program regulations, including Child Nutrition Program requirements.			
Name	Position/Title	Responsibilities (Examples: conducts micropurchases, small purchase procedures, develops IFB/RFPs, monitoring etc.)	Contact Information
Micro & Small Purchase Threshold Information: SFA Instructions: Answer questions below.			
What is the LEA/SFA micro-purchase threshold?		\$0.00	
What is the STATE micro-purchase threshold, if applicable?		\$15,000.00	
What is the LEA/SFA small purchase threshold?		\$0.00	
What is the STATE small purchase threshold, if applicable?		\$100,000 (District, Charter of Exception, or Tribally-Controlled SFA) \$350,000 (Charter of Exception, Bureau-Operated BIE SFA, or RCCU)	
Market Basket Analysis for Evaluation of Contract Award			
SFA Instructions: Answer if market basket analysis is used by selecting "yes," "no," or "not applicable" then input information below, if used.			
Vendor Name	General Goods/Services Provided	Total Paid to Vendor/3rd Party	Group Purchasing Entity Type (CN Co-Op, Agent, 3rd Party)
			Comments
			(FOR STATE AGENCY USE ONLY) Select for Review?

VENDOR PAID LIST

A vendor paid list/summary of expenses by vendor is a report from the SFA accounting system that identifies all vendors paid from the nonprofit school food service account and summarizes the total amount paid to each vendor for the prior school year. The Vendor Paid List must list **all** vendors paid by the nonprofit school food service account during the prior school year and should align with vendors listed in the SFA Procurement Table.

Best Practice: Provide a system-generated report (summary of expenditures) that lists all food service transactions from July 1 – June 30 of the prior school year, including the parameters used when generating the report.

*Sample Vendor Paid List

Expenditure Detail							
July 2023 - June 2024							
Expenses							
6810 Dues & Fees							
	9/22/2023	Check	County Health Department	NSLP		350.00	350.00
	12/19/2023	Check	County Health Department	NSLP		145.00	495.00
Total for 6810 Dues & Fees						\$ 495.00	
510 Food Service Program							
6570 Lunch expenses - NSLP							
	8/3/2023	Check	Catering Company LLC	NSLP	July Meals	973.75	973.75
	9/5/2023	Check	Catering Company LLC	NSLP	August Meals	1,200.03	2,173.78
	10/12/2023	Check	Catering Company LLC	NSLP	September Meals	1,905.89	4,079.67
	11/10/2023	Check	Catering Company LLC	NSLP	October Meals	1,459.48	5,539.15
	12/13/2023	Check	Catering Company LLC	NSLP	November Meals	1,798.53	7,337.68
	1/15/2024	Check	Catering Company LLC	NSLP	December Meals	1,509.70	8,847.38
	2/3/2024	Check	Catering Company LLC	NSLP	January Meals	1,843.33	10,690.71
	2/15/2024	Check	Catering Company LLC	NSLP	February Catering Event	190.00	10,880.71
	3/17/2024	Check	Catering Company LLC	NSLP	February Meals	2,108.41	12,989.12
	4/9/2024	Check	Catering Company LLC	NSLP	March Meals	1,908.08	14,897.20
	5/5/2024	Check	Catering Company LLC	NSLP	April Meals	2,001.11	16,898.31
	6/5/2024	Check	Catering Company LLC	NSLP	May Meals	1,126.32	18,024.63
Total for 6570 Lunch expenses - NSLP						\$ 18,024.63	
Total for 510 Food Service Program						\$ 18,024.63	
Total for Expenses						\$ 18,519.63	



The SFA Procurement Table

The SFA Procurement Table is an Excel document that the SFA will complete by entering required information such as: Contact information for person(s) involved in procurement within the SFA; Threshold Information; Group Purchasing Efforts; Vendors; Goods/services purchased; Total amount paid to vendors; and, Competitive procurement method to procure the product(s) or service(s).

The SFA Procurement Table

This table is used to identify the:

- Contact information of individual(s) involved in and responsible for procurement within the SFA
- Dollar value of the SFA micro-purchase and small purchase thresholds and State agency micro-purchase and small purchase thresholds.
- Use of group purchasing/buying organizations and/or cooperatives and use of a market basket analysis for evaluation of contract award.
- Information regarding purchases per procurement method used including: vendors; goods/services purchased; total amount paid to vendor; number of purchases; and contract information, as applicable.

Once the information in the tab is complete, the SFA will:

- Save and return the file to the Procurement Reviewer.
- Provide a vendor paid list (summary report of vendors paid from the nonprofit school food service account).

Completing the SFA Procurement Table

SFA PROCUREMENT CONTACT INFORMATION

SFA Procurement Table			
SFA NAME:			
<i>SFA Instructions: List name(s), position(s)/title(s) and contact information of those person(s) authorized by the LEA/SFA as procurement agent(s) and who is/are responsible for compliance with local, state and federal program regulations, including Child Nutrition Program requirements.</i>			
Name	Position/Title	Responsibilities (Ex: conducts micropurchases, small purchase procedures, develops IFB/RFPs, monitoring etc.)	Contact Information

Complete the contact information section so the Procurement Reviewer can contact the appropriate parties as needed throughout the review.

AUTHORIZED PROCUREMENT AGENT AND MICRO AND SMALL PURCHASE THRESHOLD

Micro & Small Purchase Threshold Information: <i>SFA Instructions: Answer questions below.</i>	
What is the LEA/SFA micro-purchase threshold?	\$0.00
What is the STATE micro-purchase threshold, if applicable?	\$15,000.00
What is the LEA/SFA small purchase threshold?	\$0.00
What is the STATE small purchase threshold, if applicable?	\$100,000 (Districts, Charters w/o Exception, & Tribally-Controlled SFAs) \$250,000 (Charters w/ Exception, Bureau-Operated BIE SFAs, & RCCIs)

SFAs may have purchasing thresholds that differ from the State thresholds. Input the micro-purchase threshold and small purchase threshold utilized within your SFA.

MARKET BASKET ANALYSIS FOR EVALUATION OF CONTRACT AWARD

Market Basket Analysis for Evaluation of Contract Award					
SFA Instructions: Answer if market basket analysis is used by selecting "yes," "no," or "not applicable" then input information below, if used.					
Vendor Name	General Goods/Services Provided	Total Paid to Vendor/3rd Party	Group Purchasing Entity Type (CN Co-Op, Agent, 3rd Party)	Comments	(FOR STATE AGENCY USE ONLY) Select for Review?

A market basket analysis is a procurement evaluation method that uses a representative sample of products to compare bids and determine contract awards. List all vendors procured utilizing this method in the prior school year.

GROUP PURCHASING EFFORTS

Group Purchasing Efforts (CN Cooperative, Agent, Third-party)				
SFA Instructions: Answer if a group purchasing effort is used by selecting "yes," "no," or "not applicable" then input information below, if used.				
Group Purchasing Effort/Name	General Goods/Services Provided	Total Paid to Vendor/3rd Party	Group Purchasing Entity Type (CN Co-Op, Agent, 3rd Party)	Comments

List all group purchasing efforts used during the prior school year, including Child Nutrition cooperatives, purchasing agents, and third-party purchasing organizations.

For each entity, provide the name, the general goods or services obtained through it, the total amount paid during the prior school year, the group purchase entity type, and any additional information that may help the Procurement Reviewer understand the procurement activity.

MICRO PURCHASES

Micro Purchases (Purchases valued below \$15,000, or most restrictive threshold) <small>SEA Instructions: Answer if micro-purchasing is used selecting "yes," "no," or "not applicable," then input information below, if used.</small>					
Vendor Name	General Goods/Services Provided	Total Paid to Vendor	Number of Purchases from this vendor during the School Year?	Comments	(FOR STATE AGENCY USE ONLY) Select for Review?

Micro purchases are one-time purchases of goods under below \$15,000 or multiple purchases of the same type of items across different vendors that offer the same product or service at a reasonable price. Provide the following information for purchases made in the prior school year using this method of procurement.

Vendor Name: Name of the vendor in which goods/services were purchased using the micro-purchase method

General Goods/Services Provided: Type of good/service provided (e.g., kitchen supplies, equipment repair, registration fees)

Total Paid to Vendor: Combined total of all purchases made to the vendor during the prior school year

Number of Purchases: Number of times purchases were made with the vendor during the prior school year

Comments: Any additional information that is pertinent to know regarding the procurement

SMALL PURCHASE/INFORMAL PURCHASES BELOW \$350,000 (SIMPLIFIED ACQUISITIONS)

[illegible]

Small purchases (also known as informal purchases or simplified acquisitions) include both single purchases between \$15,000 and \$350,000 and multiple purchases from the same vendor for the same type of goods or services that, in total, remain below \$350,000 during the prior school year. Provide the following information for purchases made in the prior school year using this procurement method.

Vendor Name: Name of the vendor in which goods/services were purchased using the small purchase method

General Goods/Services Provided: Brief description of the good/service provided (e.g., produce, milk, kitchen equipment)

Total Paid to Vendor: Combined total of all purchases made to the vendor during the prior school year

Number of Purchases: Indication of whether the vendor was only used for one purchase or multiple purchases during the prior school year

Solicitations: Indication of whether more than one quote, bid, or response was received when seeking pricing for this procurement

Third-Party Entity: Indication of whether the procurement was conducted through a cooperative, agent, or third-party entity

Comments: Any additional information that is pertinent to know regarding the procurement

FORMAL CONTRACTS: SEALED BIDS/COMPETITIVE PROPOSALS (USED FOR PURCHASES OVER \$350,000)

<small>Formal Contracts: Sealed Bids/Competitive Proposals (contracts primarily valued above \$350,000, or most restrictive small purchase threshold) <small>NA Instructions: Answer (if formal procedures are used by selecting "yes," "no," or "not applicable," then input information below, if used.</small> </small>										
Vendor Name	Goods/Services Provided	Contract Value	Solicitation Type (IFB or RFP)	Contract type (Fixed Price or Cost Reimbursable)	Contract Duration	Did the MFA receive more than one response to its solicitation?	Was this contract obtained using a CN Co-op/Agent/3rd-party entity?	Was contract amended after award?	Comments	(FOR STATE AGENCY USE ONLY) Select for Review?

Formal purchases are any purchases that exceeds the small purchase (simplified acquisition) threshold and all purchases made using an Invitation for Bid or a Request for Proposal. Provide the following information for purchases made in the prior school year using this procurement method.

Vendor Name: Name of the vendor in which goods/services were purchased using the small purchase method

General Goods/Services Provided: Brief description of the good/service provided (e.g., food, large equipment, caterer)

Contract Value: Combined total of all purchases made to the vendor during the prior school year

Solicitation Type: Indication of whether the procurement was conducted using an Invitation for Bid or a Request for Proposal

Contract Type: Indication of whether the contract pricing method was Fixed Price (predetermined cost) or Cost Reimbursable (reimbursement of actual costs)

Contract Duration: Indication of whether the contract was for less than one year, one year, or more than one year (include explanation in Comments)

Third-Party Entity: Indication of whether the procurement was conducted through a cooperative, agent, or third-party entity

Amendments: Indication of whether the contract was modified after award

Comments: Any additional information that is pertinent to know regarding the procurement

Note: Please refer to **Page 16** for guidance on completing this section correctly.

FOOD SERVICE MANAGEMENT COMPANY (FSMC) CONTRACTS

Food Service Management Company (FSMC) Contracts <small>SFA Instructions: Answer if a FSMC is contracted by selecting "yes", "no" or "not applicable" then input information below, if used.</small>										
FSMC Name	Goods/Services Provided	Contract Value	Solicitation Type (FB or RFP)	Contract type (Fixed Price or Cost Reimbursable)	Contract Year	Did the SFA receive more than one response to its FB/RFP?	Was this vendor/contract obtained using a CN Coop/Agent/Third-Party Entity?	Was contract amended after award?	Comments	(FOR STATE AGENCY USE ONLY) Select for Review?

FSMCs are a commercial enterprise or a nonprofit organization which is or may be contracted with by the SFA to manage any aspect of the school food service. Provide the following information for contracts with an FSMC in the prior school year.

FSMC Name: Name of the vendor in which goods/services were purchased using the small purchase method

General Goods/Services Provided: Brief description of the good/service provided (e.g., meal preparation, food purchasing, staffing)

Contract Value: Combined total of all payments made to the FSMC during the prior school year

Solicitation Type: Indication of whether the FSMC was obtained using an Invitation for Bid or a Request for Proposal

Contract Type: Indication of whether the contract pricing method was Fixed Price (predetermined cost) or Cost Reimbursable (reimbursement of actual costs)

Contract Year: Indication of whether the contract was in its Base Year or which renewal year the contract was in during the prior school year

Responses: Indication of whether the SFA received more than one response to the solicitation for an FSMC

Third-Party Entity: Indication of whether the FSMC was obtained using a cooperative, agent, or third-party entity

Amendments: Indication of whether the contract was modified after award

Comments: Any additional information that is pertinent to know regarding the procurement

PROCESSING CONTRACTS FOR USDA FOODS

[illegible]

Prior to completing the Processing Contracts for USDA Foods section, it is helpful to obtain the SFA planned assistance level (PAL) used in Processing Diversion from the prior school year.

Processor Name: based on the State Participation Agreement(s) (SPA) list and the available foods they can process

Goods Provided: which materials were processed

Contract Value: Combined total of all payments made to the processor during the prior school year (based on the prior year's usage via the Monthly Performance Reports (MPR) within K-12 Foodservice, and Processor Link management systems)

Procurement Type: Dependant on contract amount (Micro, Simplified Acquisition, and Formal)

Contract Duration: up to one year, cannot be more

Responses: Indication of whether the SFA received more than one response to the solicitation for the processing contract

Third-Party Entity: Indication of whether the processing contract was obtained using a cooperative, agent, or third-party entity

Amendments: Indication of whether the contract was modified after award

Important Considerations for Completing the SFA Procurement Table

Did the SFA pay a vendor that was procured through the ASPIN/MOHAVE cooperative?

If **yes**, these ASPIN/MOHAVE vendors should be listed in the "Formal Contracts: Sealed Bids/Competitive Proposals" section of the SFA Procurement Table.

- Please enter information in columns **A-J** and enter the name of the **vendor** (e.g., Shamrock Foods, Shamrock Farms, etc.), not "ASPIN/MOHAVE", in the vendor name column (column A).

Did the SFA use a Request for Proposal (RFP) or Invitation for Bid (IFB) to procure a vendor even if the dollar value paid during the year to the vendor was less than the Simplified Acquisition Threshold?

If **yes**, then the vendor should be listed in the "Formal Contracts: Sealed Bids/Competitive Proposals" section of the SFA Procurement Table. Please enter information in columns **A-J**.

Did the SFA procure a vendor for a service that is paid with both NSLP funds and non-NSLP funds?

Some examples:

- **A waste management contract for the entire SFA including cafeteria and all other areas of schools**
- **The purchase of computers for the entire SFA including the cafeteria as well as classrooms.**

If **yes**, the method of procurement for the service must be considered and not simply the dollar amount paid with NSLP funds.

- For example, if \$9,000 of NSLP funds was spent on cafeteria waste management but the waste management vendor was procured through a Request for Proposal (RFP) then the vendor should be listed in the "Formal Contracts: Sealed Bids/Competitive Proposals" section of the SFA Procurement Table.



Submitting the SFA Procurement Table and Required Documentation

Procurement reviews will be conducted fully off site by a third-party entity (Myers and Stauffer). Communication with your Procurement Reviewer is imperative for a successful procurement review. If there are any questions regarding the SFA Procurement Table or documentation required, contact your Procurement Reviewer for assistance.

Submitting the SFA Procurement Table and Required Documentation

Once the SFA Procurement Table is completed by the SFA and all required documents are gathered:

- Save the Excel file and return the file to the Myers and Stauffer Procurement Reviewer.
- Provide a vendor paid list/summary of expenses by vendor and any other appropriate documentation.

The Procurement Reviewer will use the completed SFA Procurement Table and vendor paid list to select vendors for review under each procurement method. Supporting procurement documentation including solicitations, evaluations, contracts, and invoices, will be requested for each selected vendor. Per 2 CFR 200.318(i), the SFA must maintain records sufficient to detail the history of procurement transactions. In the event the SFA lacks documentation to support procurements, the reviewer will issue a finding, provide technical assistance to the SFA, and require a corrective action plan.



Resources

The following resources are available to support the procurement review and serve as helpful references throughout the review process

Resources

The following is a list of resources that are helpful for conducting proper procurement:

- [Procurement Basics](#) (Online Course)
- [Procurement of Food & the Geographic Preference Expansion](#) (Online Course)
- [Buy American Accommodation Quick Guide](#)
- [CNP Written Code of Conduct](#) (template)
- [CNP Procurement Procedures](#) (template)
- [What to Expect of your Procurement Review](#)

Thank you!

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.) should contact the State or local Agency that administers the program or contact USDA through the Telecommunications Relay Service at 711 (voice and TTY). Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at [How to File a Program Discrimination Complaint](#) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Mail Stop 9410, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442; or (3) email: program.intake@usda.gov.

USDA is an equal opportunity provider, employer, and lender.